

AS/A Level Applied Information and Communication Technology 9713

Unit 15: Integration 2 – Mail Merge

Recommended Prior Knowledge

Students will require a basic knowledge of, and some practical skills in:

- document production;
- the creation of data sources in the form of databases, spreadsheets, tables and text files;
- manipulation and selection of data using the facilities of database, spreadsheet and word processing applications.

In preparation for this module it is recommended that the material from IGCE Applied Information and Communication Technology (syllabus 9713) AS Level has been covered, especially the whole of sections 11 (Data Manipulation), 14 (Spreadsheets), 13 (Output Data) and objectives 10a, 10f and 10g from Section 10 (Document and Presentation Production)

This should include the following:

- entering data with 100% accuracy;
- opening/loading/importing stored data;
- defining database record structures and field types;
- sorting data (alphabetical/numeric, ascending/descending);
- selecting data by specified criteria (AND/OR/NOT);
- save/export data for use in other formats including text files.

In preparation for this module you could also cover the basic knowledge of file management techniques including:

- creating, renaming and deleting files/folders;
- browsing a directory or folder;
- saving files in different formats

Context

For A2 level the candidates must be able to meet all of the Assessment Objectives 8 to 14 for AS level. Subject to this requirement, this sub-unit may be studied on its own or in conjunction with the other A2 practical units. There is no requirement to study any other A2 unit prior to this one. .

Outline

This unit covers the following areas:

The use of appropriate software to:

- create master document structure
- create a source file in the most appropriate applications package

- check data entry
- set up variable fields for automatic completion
- set up variable fields to control record selection/omission at mail merge run time
- set up fields and prompts for manual completion
- automatically select the required records
- manual proof reading and correction of documents and source files
- use of appropriate software tools to ensure documents/files are error free
- generate form letters, labels, emails and faxes

Candidates will also need to:

- manually verify data entry
- understand the purpose of validation and verification

AO	Learning outcomes	Suggested Teaching activities	Learning resources
15	Introduction to mail merge	<p>Illustrate Bulk Mail shots using table of contact details (including an email address) as a data source.</p> <p>Include:</p> <p>form letters, (Recipients address, data, salutation, closure etc.);</p> <p>labels, (standard & custom sizes, use of commercial stationary);</p> <p>pro-forma, (Simple table design to facilitate collection and publication of data and information);</p> <p>fax, (appropriate fax layouts and content);</p> <p>email, (standard email fields - from, to, cc, bcc, subject, body);</p> <p>Demonstrate the use of mail merge functions and commands.</p>	<p>A prepared word processed table of contact data. Could include:</p> <p>Client id</p> <p>Title</p> <p>Forename</p> <p>Surname</p> <p>Email address</p> <p>Telephone number</p> <p>Address fields including post/zip/?</p> <p>Code</p> <p>Make of vehicle</p> <p>Year of manufacture of vehicle</p> <p>Number of records need to be sufficient to enable sorting and searching opportunities.</p> <p>A context for the mailing – e.g. vehicle service reminder.</p>

		Teach and allow students to create the different forms of mass mailing media.	Exemplar pro forma, fax documents and label stationery.
15a(i)	Create master document structure	<p>Teach students to create a variety of different types of master documents in their software package and opening different types of master document (importing from rtf or txt format).</p> <p>These should be examined to see where merge fields could be placed in order to automate the process.</p>	<p>A variety of prepared master documents for a range of applications.</p> <p>Examples of 'real life' documents that could be or have been mail merged would be ideal for this.</p>
15a(ii)	Create a source file in the most appropriate applications package.	<p>Cover data source options and format requirements. Include:</p> <ul style="list-style-type: none"> • simple word processed table with headers; • spreadsheet table with headers; • tables in a database; • text files: .csv, .tsv, .rtf etc. <p>Teach students to create a word processed table as a data source and add data.</p> <p>Allow students to practice the merge to new document function.</p> <p>Allow students to use the data source to merge data into the output formats created earlier.</p> <p>Review import/export of data into spreadsheet/database/text applications.</p> <p>Teach students to:</p> <ul style="list-style-type: none"> • export word processed tables as a .csv files • import .csv data to a spreadsheet application • use the spreadsheet file as the data source to merge data into formats created earlier <p>Review work carried out in 11a, field types and flat-file databases.</p> <p>Teach students to:</p> <ul style="list-style-type: none"> • import .csv data to a database application • use the database table as a data source to merge data into media created earlier. 	<p>Printed copy of table of contact details or provide text file for editing.</p>
15a(iii)	Check data entry	Review the work undertaken in unit 11 section a(iv)	

15a(iv)	Set up variable fields for automatic completion.	Discuss commonly used variable fields IF, NEXT, SKIPIF, NEXTIF, COMPARE, IF-THEN-ELSE etc.) Demonstrate use of IF-THEN-ELSE field in customising merged data. Using data and output formats created earlier, teach, and allow students to practice, the use of variable fields in merging to new documents.	
15a (v)	Set up variable fields to control record selection/omission at mail merge run time.	Discuss requirements to sort/filter recipients of bulk mailings. Demonstrate the use of sort/filtering facilities in mail merge tools. Using data and formats created earlier, teach, and allow students to practice, the use of sorting/filtering tools in merging to new documents.	
15a (vi & vii)	Set up fields and prompts for manual completion.	Discuss the need to add new or customised information to bulk mailings. Demonstrate use of ASK and/or FILLIN field in customising merged data. Teach, and allow students to practice, the use of variable fields in merging to new documents.	List of insertions e.g. "service mechanic names" for each contact record for manual entry.
15a (viii)	Automatically select the required records	Review work carried out in section 11b. Discuss the need to use pre-written searches/filters for frequently needed subsets of bulk mailing lists. Demonstrate the use of saved searches (queries) to select records in a database application. Include the use of Boolean operators. Teach and allow students to use the previously created database to create queries to select records according to appropriate criteria. Review work carried out in 11a, relational databases. Demonstrate the use of queries to select fields from linked records in a relational database. Review the use of the queries as a data source in a mail merge document. Provide, or allow students to create, a linked database with data additional to the database of simple contact details provided or developed earlier.	Contacts data source as database with pre-written queries e.g. Title = Miss OR Ms Post/Zip code = CB* Make of vehicle = Mercedes Year of manufacture <2004 Include related table of details of vehicles linked by client id fields. e.g. Max service interval (months) Max service distance (km) Date of last service. Printout of vehicle details or text file for importing.

		Teach, and allow students to practice, the use of queries to select fields from linked records in a relational database as a data source in merging data to new documents.
15b	Use manual methods and software tools to ensure error free accuracy	Review and discuss the issues, conventions and skills covered in unit 10 sections g(i) and g(ii).
15c	Perform mail merge	<p>Review output formats and data sources created previously. Demonstrate merge to printer, merge to fax and merge to email Allow students to merge form letters, and pro-forma to printer. <i>Optional</i> Allow students to merge fax format documents to operating system fax service component – (requires local pc setup). Use screenshots as evidence. Allow students to merge email – (requires compatible email client)</p>